



# Financial Inclusion Together

## Awareness Raising Session Outline



Learning Outcomes	Learning Objectives – The learner will be able to:
<ul style="list-style-type: none"> <li>Understand what financial inclusion is and the impact it has on people</li> </ul>	<ul style="list-style-type: none"> <li>Describe what financial inclusion is</li> <li>Identify citizens who are /or at risk of experiencing issues around poverty and financial inclusion</li> <li>Describe the benefits of financial inclusion and possible barriers</li> <li>Identify local and national issues which impact upon people's financial inclusion</li> </ul>
<ul style="list-style-type: none"> <li>Understand their role in addressing Financial Inclusion</li> </ul>	<ul style="list-style-type: none"> <li>Identify the different levels of advice and guidance</li> <li>Recognise the parameters and boundaries of the the level of support they are able to offer and when they need to refer</li> <li>Recognise how addressing financial inclusion could impact on their service/ role</li> </ul>
<ul style="list-style-type: none"> <li>Be able to identify when somebody needs support with financial inclusion issues</li> </ul>	<ul style="list-style-type: none"> <li>Describe how they would identify there is a financial inclusion issue</li> <li>Demonstrate understanding of skills needed to sensitively discuss financial inclusion issues</li> <li>Demonstrate appropriate questioning and listening skills</li> </ul>
<ul style="list-style-type: none"> <li>Offer basic support to improve financial inclusion and access to services</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrate basic knowledge of Welsh Government's 5 financial inclusion themes</li> <li>Identify tools and resources which are available to support citizens with financial inclusion</li> </ul>
<ul style="list-style-type: none"> <li>Be able to refer and signpost appropriately to specialist providers</li> </ul>	<ul style="list-style-type: none"> <li>Identify the difference between signposting and referring</li> <li>Demonstrate an understanding of when it's appropriate to signpost and when a referral is necessary</li> <li>Demonstrate a knowledge of relevant local and national advice organisations and the services they provide</li> <li>Identify what makes an effective referral and demonstrate an understanding of how to make a quality referral</li> </ul>